

SOUTHERN CALIFORNIA



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**Orange County Transportation Authority:** Lou Correa, County of Orange

**Riverside County Transportation Commission:** Robin Lowe, Hemet

**Ventura County Transportation Commission:** Keith Millhouse, Moorpark

## MEETING OF THE

# PLANS & PROGRAMS TECHNICAL ADVISORY COMMITTEE

**Thursday, May 18, 2006  
10:00 a.m. – 12:00 p.m.**

**SCAG Offices  
818 W. 7<sup>th</sup> Street, 12<sup>th</sup> Floor  
San Bernardino Conference Room  
Los Angeles, CA 90017  
(213) 236-1800**

### Video Conference Location

SCAG Inland Empire Office  
3600 Lime Street, Suite 216  
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# PLANS & PROGRAMS TECHNICAL ADVISORY COMMITTEE

## AGENDA

ITEM		TIME	PAGE#
1.0	<b><u>Call to Order and Introductions</u></b>	Chair Doug Kim, LACMTA	
2.0	<b><u>Public Comment Period</u></b> Members of the public desiring to speak on an agenda item or items not on the agenda, but within the purview of this committee, must fill out a speaker's card prior to speaking and submit it to staff before the meeting is called to order. Comments will be limited to three minutes. The Chair may limit the total time for comments to twenty (20) minutes.		
3.0	<b><u>Consent Calendar</u></b>		
3.1	<b><u>Approval of Meeting Minutes from April 18, 2006</u></b> <b><i>Attachment</i></b>		1
4.0	<b><u>Discussion Items</u></b>		
4.1	<b><u>RTP Goals, Policies, Performance Measures</u></b> <b><i>Attachment</i></b>	Tarek Hatata, System Metrics	30 min.  9
4.2	<b><u>Regional Housing Needs Assessment (RHNA) Update</u></b>	Hasan Ikhata, SCAG	20 min.
4.3	<b><u>Standing Items</u></b>		
4.3.1	<b><u>Growth Forecast</u></b> <i>Baseline County Level Growth Forecast</i> <b><i>Recommended Action:</i></b> <b><i>Approve the County Growth Forecast Methodology and Assumptions</i></b>	Frank Wen, SCAG	10 min.
4.3.2	<b><u>Highways and Arterials</u></b> <i>No report</i>		
4.3.3	<b><u>TDM / Non-Motorized</u></b> <i>No report</i>		
4.4	<b><u>RTP Project List Request</u></b> <b><i>Attachment</i></b>	Tarek Hatata, SCAG	10 min.  13
4.5	<b><u>Report on Finance Task Force Meeting</u></b> <b><i>Attachment</i></b>	Tarek Hatata, System Metrics & Annie Nam, SCAG	15 min.  15



# PLANS & PROGRAMS TECHNICAL ADVISORY COMMITTEE

## AGENDA

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ITEM			TIME	PAGE#
4.6	<u>Update on Infrastructure Bond Measure</u>	Don Rhodes & Jeff Dunn, SCAG	15 min.	
5.0	<u>Staff Report</u>			
6.0	<u>Next Meeting Date &amp; Adjournment</u>			
	The next meeting date is Thursday, June 15, 10 a.m. to 12:00 p.m.			



# PLANS & PROGRAMS TECHNICAL ADVISORY COMMITTEE

## **MINUTES** for April 18, 2005

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The following minutes are a summary of the Plans & Programs Technical Advisory Committee (TAC) meeting. Audio cassette tapes of the actual meeting are available for listening at SCAG's office.

### 1.0 **Call to Order and Introductions**

Mr. Doug Kim, LACMTA, called the meeting to order. Introductions were made.

### 2.0 **Public Comment Period**

There were no comments.

### 3.0 **Consent Calendar**

#### 3.1 **Approval of Meeting Minutes from March 16, 2006**

The meeting minutes were approved.

### 4.0 **Action Items**

#### 4.1 **RTP Growth Forecast Assumptions**

Mr. Frank Wen, SCAG, continued the discussion from last month regarding the regional baseline forecast methodology and assumptions. A handout was provided. Mr. Wen stated that the agenda packet includes information that addresses the TAC's questions and concerns from the last meeting. Ms. Tracy Sato, City of Anaheim, asked for clarification on the location of that information, specifically regarding the California Department of Finance (DOF) data on migration, information on 2000 headship rates, clarification on persons-per-household figures, and a comprehensive table showing figures for the 2004 and 2008 RTP for all appropriate horizon years. Mr. Simon Choi, SCAG, directed the TAC to pages in the agenda packet containing the information requested, and added that the comprehensive figures for horizon years are contained in the upcoming presentation.

Ms. Falan Guan, LACMTA, asked for headship rates for future years. Ms. Sato noted that the DOF data includes both births and deaths and not just migration. When asked why SCAG used the DOF projection in its analysis, Mr. Choi stated that DOF projections of population for all counties in California tell us where future growth occurs. Population growth moves from coastal counties toward inland counties. SCAG forecasts of population cover only six counties in the SCAG region.

**Action: the TAC approved the regional growth forecast methodology and assumptions.**

### 5.0 **Discussion Items**

#### 5.1 **Standing Items**



## MINUTES for April 18, 2005

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### 5.1.1 Growth Forecast *County-Level Growth Forecast*

Mr. Hsi-Hwa Hu, SCAG, began with the discussion of the county-level employment forecasts. A handout was provided. Mr. Hu presented each county's historical share of total SCAG region jobs. First, job share has shown a significant decrease for Los Angeles County since 1972. Second, job share has shown slower growth for Orange and Ventura. Third, job share and job numbers have shown increases for the Inland Empire counties of Riverside and San Bernardino.

SCAG examines how aging trends may affect the labor force and job growth at the county level. In 2035, 18.5% of the SCAG region population will be 65 years or older, while the working age population (ages 16 to 64) is projected to decline to 58.6%. SCAG projects that this aging trend will be more significant in Los Angeles, Orange, and Ventura Counties, where growth in the elderly population will exceed growth in the working age population. The situation is reversed for the Inland Empire and Imperial County. This has implications for the relative competitiveness of each county in competing for regional job growth.

Staff tested the relationship between job growth and labor force growth, and found that a change in labor force is significantly associated with a change in jobs. In response to a question, Mr. Hu stated that the regression analysis doesn't show direction, but staff did control for other factors including county level population and employment density. SCAG projects that employment growth and shares of regional jobs in Los Angeles, Orange, and Ventura Counties are projected to slow down more than historical trends while jobs in Imperial County and the Inland Empire are expected to grow faster than what is suggested by historical trends.

SCAG used a shift-share model for the short-term projection to 2014. For the long-term projection from 2015 to 2035, the total employment is controlled at the regional level and trends are extrapolated from historical data (1990-2005) and the short-term forecast results to 2014. The historical data are the wage and salary employment from the EDD 2005 Benchmark, as well as SCAG estimates of self-employment based on the 2000 Census PUMS. The county projections are then adjusted to account for labor force influences. Mr. Hu concluded with tables comparing the employment forecasts for the 2007/8 RTP and 2004 RTP.

Ms. Paula McHargue, LAWA, asked if SCAG assumes that people will stay in the same county as they age. Mr. Hu stated that the forecast reflects a more balanced county level distribution of population and employment. In response to another question, Mr. Hu stated that the next step is to look at the 20 NAICS industries. Mr. Miles Mitchell, LADOT, asked what was causing Los Angeles County to lose its share of the regional employment. Mr. Hu stated that it was due to historical trends and economic competitiveness, and the aging



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population is one additional factor. There is still a projected increase in absolute numbers of jobs. Mr. Jack Tsao, City of Los Angeles, asked what the impact would be of the 2% growth vision. Mr. Frank Wen, SCAG, stated that the aging trend is consistent with the 2% strategies, with baby boomers trading down to smaller size condos in high-density developments.

Mr. Simon Choi, SCAG, next presented the county level population and household forecasts. The methodology involves disaggregating the regional forecast while considering generic or unique trends of each county. The aggregate of county forecasts are compared to regional numbers to ensure consistency. Other considerations include the 2004 RTP forecasts as well as input from subregions and local jurisdictions.

Recent data used for the demographic forecast include interim projections of U.S. population by age, sex, race, and Hispanic origin from the Census Bureau in March 2004, and population projections by race/ethnicity for California and its counties from the DOF in May 2004.

Demographic assumptions for fertility, mortality, net immigration, and net domestic migration are consistent with those assumed at the regional level. Additional county assumptions include land use changes, significant projects, general plan/specific plan updates, and zoning revisions. Where county birth rates by age and race/ethnicity are higher than corresponding regional rates, then the county rates are converged to the regional rates. Where county birth rates are lower, they are kept constant. Historical trends, regional numbers, and local input are used to determine the county share of domestic net migration. International net immigration is developed using the annual average between 1990 and 2005.

Next, Mr. Choi presented population age pyramids and summary indicators for the six counties and the regional aggregate. Finally, Mr. Choi presented comparison tables by county and horizon year for the population and household forecasts. The 2030 population forecast of 23.1 million is higher than what was projected for 2030 in the 2004 RTP, 22.9 million. The 2030 household forecast of 7.42 million is slightly lower than what was projected in the 2004 RTP, 7.48 million.

In response to a question, Mr. Wen stated that transportation investments can have an impact on job and household growth. The 2004 RTP called for over \$60 billion in private sector investment in the transportation system, which resulted in an additional job and household growth. Regarding the 2% strategy, SCAG will be holding workshops with the subregions and local jurisdictions during the summer, and this input will be incorporated into the Plan forecast development.

Ms. Falan Guan, LACMTA, asked if SCAG forecasts headship rates by ethnicity. Mr. Choi stated SCAG uses Census data from 1980 to 2000 for household headship rate by age, ethnicity, and gender. Using the relationship



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between householder and population at certain age, ethnic, and gender groups, we can calculate the household headship rate given the population projection. Ms. Guan asked for a table showing this information.

Mr. Ty Schuiling, SANBAG, stated that the challenge lies in translating countywide totals down to the TAZ level. In the last cycle, many parts of the region were not aware of what the growth totals were for their jurisdictions or for subareas in their jurisdictions. He asked what kind of process was envisioned for accomplishing this. Mr. Wen stated that SCAG did not adopt the jurisdiction-level numbers during the last RTP, but did provide them as advisory information. The focus was not on the city-level absolute numbers, but rather the emphasis was on the specific 2% growth opportunity areas. For the next RTP, SCAG can continue to publish the advisory jurisdiction-level growth forecast numbers. The policy forecast could call for some areas to take additional growth due to full utilization of existing infrastructure or planned investments which would result in transportation and air quality benefits. Mr. Wen stated that the numbers represent the direction we want to move towards, but the key lies in the regional policies that are necessary to realize those numbers.

Mr. Schuiling stated that we have entered an era in California in which regional forecasts will become the basis for housing planning such as the Regional Housing Needs Assessments. He supports SCAG's efforts to bring the forecast to bear on regional housing problems, but it is not going to be acceptable to simply have forecasts adopted at a countywide or subregional level when the numbers have specific mandates associated with them in the housing arena.

Mr. Hasan Ikhata, SCAG, stated that SCAG is pursuing the linkage of planning for transportation, growth, and housing. SCAG is proposing a Pilot Program in which RHNA has a 20-year period that is linked to the RTP growth forecast. There is confusion as to whether this would replace existing statute, and how this relates to the Compass 2% strategy and to transportation. There are two RHNA workshops scheduled for SCAG's Regional Council and policy committee members, one on April 24 and another on May 1. The CEHD will be asked in May to approve the new approach for RHNA. SCAG would like the subregions to take the lead in working with their jurisdictions on the RHNA.

In response to a question, Mr. Ikhata stated that the TAC would be the forum to address technical issues related to the RHNA. Mr. Wen stated that the panel of experts would provide input to SCAG staff likely some time early May, and this would be reported to the TAC.

Mr. Miles Mitchell, LADOT, asked when the TAC would be asked to adopt the county numbers. Mr. Wen stated that the TAC is not asked to adopt the numbers but rather to provide input on the methodology and assumptions.



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### 5.2 OCTA Draft Long Range Transportation Plan

Mr. Richard Marcus, OCTA, stated that there are three major efforts underway, the Long Range Transportation Plan (LRTP), the EIR for the LRTP, and the Measure M reauthorization plan. Measure M expires in 2011 and voter approval is required to extend it another 30 years. Polls currently indicate 65% to 70% approval; two-thirds are required to pass. The reauthorization plan is included in the LRTP and the EIR thus covers the Measure M projects. The LRTP was modeled to 2030, but the financial plan extends to 2041. The Draft was approved by the OCTA Board on January 9, 2006. The public comment period on the Draft LRTP and EIR closed March 31, and OCTA received 31 comments.

The LRTP included three basic goals: improve mobility, protect our transportation resources, and enhance quality of life. Three alternatives were studied: Constrained (no passage of Measure M; \$28 billion available through 2030), Balanced (includes passage of Measure M; \$40 billion available), and Unconstrained. Mr. Marcus discussed the different modal improvements proposed in the LRTP. In 2030, the LRTP reduces daily vehicular delay by 34% and increases transit ridership by 26%.

OCTA is currently finalizing the Draft and responding to comments. The Board will be asked to approve the final LRTP, along with the Measure M reauthorization plan, on July 10.

Mr. Gerald Bare, Caltrans District 7, noted that Caltrans is planning to operate the new SR-22 HOV lanes without limited ingress/egress, similar to what is done in the Bay Area. Ms. Sharon Neely, San Gabriel Valley COG, stated that it would be helpful to quantify the actual benefits of specific projects in the Measure M material to generate voter support. Mr. Ty Schuiling, SANBAG, there was a quantification of the air quality benefits of grade separations in the Alameda Corridor East, and SANBAG has done some work quantifying delay reduction benefits associated with intersection improvements and grade separations.

### 5.3 RTP Goals, Policies, and Performance Measures

This item was postponed until the next meeting.

### 5.4 SAFETEA-LU Update & Project Submittal Request

Mr. Naresh Amatya, SCAG, provided an update on SAFETEA-LU and the RTP. As discussed before, SAFETEA-LU allows MPOs to move to a 4-year RTP cycle immediately. SCAG intends to take advantage of this opportunity in order to align the RTP schedule with the development of the AQMP/SIP. However, due to the way SAFETEA-LU is written, SCAG will be facing restrictions on amending the RTP during the fourth year. Given these two constraints, staff is considering advancing the RTP adoption date to November or December 2007. At the same time, staff is continuing to pursue other solutions, including the rule-making process, the legislative process, as well as a "gap analysis" developed by the state of Ohio. This strategy involves updating the current 2004 RTP to comply with new SAFETEA-LU planning





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requirements. The approach has been blessed in concept by the FHWA representatives in Ohio.

Next, Mr. Amatya discussed the project information request that staff will be sending out in the next few weeks. During every RTP development cycle, SCAG updates its list of constrained and unconstrained projects by requesting up-to-date information on project descriptions, costs, schedules, etc. SCAG will be looking for more detailed information, including information on project costs and funding sources, priority, and purpose and need. In recent discussions with the FHWA, SCAG has been informed that significant increases in project costs must be reflected in the RTP financial plan, through the amendment process, in order to maintain financial constraint.

Mr. Amatya stated that SCAG will provide the county commissions with a spreadsheet containing the current RTP projects and any additional fields of data that are needed. Examples will be shown at the next meeting. Ms. Sharon Neely, San Gabriel Valley COG, stated that the resources required to monitor projects at such a close level (design, right-of-way, construction) would be challenging. As costs of steel and concrete increase, agencies may down-scope projects to live within the budget.

Ms. Grace Balmir, FHWA/FTA, stated that all MPOs are looking for this detailed information and some are already doing a good job of tracking it. The FHWA/FTA is looking to decrease the number of RTIP/RTP amendments. When asked to take a federal action on a NEPA document, FHWA will be looking to ensure that the project scope and cost in the NEPA document are consistent with the RTP. Otherwise, the RTP would have to be amended.

Ms. Neely asked what FHWA considered a significant cost/scope change that would require an RTP amendment. Ms. Balmir stated that generally it is 10%, but FHWA would work with the different conditions that different regions face. Ms. Neely stated that the result would be agencies over-estimating costs to avoid having to do amendments. It would be difficult if an agency has figured out how to fund a construction contract but has to wait for an RTP amendment. Ms. Balmir stated that she is reviewing an RTIP amendment right now for an Orange County project that has increased in cost but the scope is the same, and they are ready to go. The project is being allowed to proceed.

### **6.0 Staff Report**

There was no report.

### **7.0 Comment Period**

Mr. Dana Gabbard, So. Cal. Transit Advocates, mentioned a report by the LA City Council Legislative Analyst about the federal transportation trust fund.

Mr. Ty Schuiling, SANBAG, stated that we should conceive of a goal or policy guidance to address project cost increases as well as energy sources. Ms. Annie Nam, SCAG, stated



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that these issues were discussed at the last Transportation Finance Task Force and will be highlighted and debated in the development of the RTP's revenue forecast.

### 8.0 **Next Meeting Date & Adjournment**

The next meeting date was announced as June 15, 2006, and the meeting was adjourned.

# PLANS & PROGRAMS TECHNICAL ADVISORY COMMITTEE

## **MINUTES** for April 18, 2005

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### **Attendance**

<b>Name</b>	<b>Agency</b>
Grace Balmir	FHWA/FTA
Gerald Bare	Caltrans-District 7
Shefa Bhuiyan	Caltrans-District 8
Joanna Capelle	SCRRA
Yuying Chu	System Metrics Group
Deborah Diep	CDR, CSU Fullerton
Viviane Doche-Boulos	DB Consulting
Michael Fitts	Endangered Habitats League
Kim Fuentes	South Bay Cities COG
Dana Gabbard	So. Calif. Transit Advocates
Bill Gayk	Riverside County TLMA
Falan Guan	LACMTA
Tarek Hatata	System Metrics Group
Mark Herwick	County of Los Angeles
Jack Humphrey	Gateway Cities COG
Doug Kim	LACMTA
Richard Marcus	OCTA
Paula McHargue	LAWA
Catherine McMillan	CVAG
Kayla-Ann Mejia	Boyle Heights Neighborhood Council
Miles Mitchell	LADOT
Sharon Neely	San Gabriel Valley COG
Dilara Rodriguez	City of Los Angeles
Tracy Sato	City of Anaheim
Eileen Schoetzow	LAWA
Ty Schuiling	SANBAG
Jim Stewart	SCCED
John Stesney	LACMTA
Warren Teitz	MWD
Jack Tsao	City of Los Angeles
Tony Van Haagen	Caltrans-District 7
Kevin Viera	WRCOG
Carla Walecka	TCA

### ***Via audio/video conference***

Ben Cacatian	VCAPCD
Paul Fagan	Caltrans-District 8
Brian Kuhn	City of Palmdale

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### **SCAG Staff**

Joseph Alcock	Hasan Ikhata
Naresh Amatya	Philip Law
Joe Carreras	Rongsheng Luo
Simon Choi	Rich Macias
Lynn Harris	Annie Nam
Hsi-hwa Hu	Frank Wen

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## System Performance Measures

### Goals, Policies, and Performance Measures

System Metrics Group, Inc.

#### 2004 RTP Goals ...

##### Adopted 2004 RTP Goals

- 1 Maximize **mobility** and **accessibility** for all people and goods in the region
- 2 Ensure travel **safety** and **reliability** for all people and goods in the region
- 3 **Preserve** and ensure a **sustainable** regional transportation system
- 4 Maximize the **productivity** of our transportation system
- 5 Protect the **environment**, improve air quality and promote energy efficiency
- 6 Encourage **land use and growth patterns** that complement our transportation investments

## 2004 RTP Policies ...

### Adopted 2004 RTP Policies

- 1 *Transportation investments shall be based on SCAG's adopted Regional Performance Indicators.*
- 2 *Ensuring safety, adequate maintenance, and efficiency of operations on the existing multi-modal transportation system will be RTP priorities and will be balanced against the need for system expansion investments.*
- 3 *RTP land use and growth strategies that differ from currently expected trends will require a collaborative implementation program that identifies required actions and policies by all affected agencies and sub-regions.*
- 4 *HOV gap closures that significantly increase transit and rideshare usage will be supported and encouraged, subject to Policy #1.*
- 5 *Progress monitoring on all aspects of the Plan, including timely implementation of projects, programs and strategies, will be an important and integral component of the Plan.*

## Possible issues ...

- **As suggested during the last TAC, we may want to recommend a specific policy to address transportation financing (Ty Schuling)**
- **How about policies that address current and possibly future gas price increases?**
- **Do we need to include language to address security to address SAFETEA-LU requirements? Note that the new requirements now split safety and security.**
- **Do we need to address non-motorized specifically (note that we tried to stay away from modal-specific goals or policies)**
- **How should we address the environmental mitigation requirements?**
  - *Plan must include "a discussion of types of potential environmental mitigation activities and potential areas to carry out these activities..."*
- **What about the statewide safety plan? Do we need a specific policy for integrating with or influencing this effort?**
- **We addressed many aspects of operations and management in the 2004 RTP. Do we need any additional emphasis?**
  - *Plan must identify "operational and management strategies to improve the performance of existing transportation facilities to relieve vehicular congestion and maximize the safety and mobility of people and goods."*

## Note that we need to do complete many of these efforts to amend our 2004 RTP ...



- As we updated you last time, SCAG will undertake a gap analysis to supplement the 2004 RTP and amend it so that it can be deemed consistent with SAFETEA-LU
- The gap analysis will address the specific areas required by SAFETEA-LU that were not (sufficiently) addressed by the 2004 RTP, including:
  - Security
  - Addition of intermodal connectors
  - Inclusion of walkways and pedestrian facilities
  - Discussion of environmental mitigation strategies
  - Operations and management of transportation
- We held preliminary discussions with FHWA to facilitate acceptance of the final supplements to the RTP
- Our plan is to develop these by the end of 2006 to allow for ample time for review, adoption, and acceptance
- We will work closely with the county commission staff to address several of these gaps.

## We also need to look at the performance measures and update/revise them if needed



- Do we need additional performance measures to address new requirements
- Some have suggested that we need freight specific performance measures. Which ones, if any, should we consider?
- Any other changes?

## Performance Indicators, Measures and Outcome

Performance Indicator	Performance Measure(s)	Definition	Performance Outcome
<b>Mobility</b>	<ul style="list-style-type: none"> <li>Average Daily Speed</li> <li>Average Daily Delay</li> </ul>	<p><u>Speed</u> - experienced by travelers regardless of mode</p> <p><u>Delay</u> - excess travel time resulting from the difference between a reference speed and actual speed. Total daily delay and daily delay per capita are the indicators used.</p>	<p>11% improvement</p> <p>37% improvement</p>
<b>Accessibility</b>	<ul style="list-style-type: none"> <li>Percent PM peak period work trips within 45 minutes of home</li> <li>Distribution of work trip travel times</li> </ul>		<p>Auto: 90%</p> <p>Transit: 35%</p> <p>Auto: 7% improvement</p> <p>Transit: 6% improvement</p>
<b>Reliability</b>	<ul style="list-style-type: none"> <li>Percent variation in travel time</li> </ul>	Day-to-day change in travel times experienced by travelers. Variability results from accidents, weather, road closures, system problems and other non-recurrent conditions.	10% improvement
<b>Safety</b>	<ul style="list-style-type: none"> <li>Accident Rates</li> </ul>	Measured in accidents per million vehicle miles by mode.	0.5 % improvement
<b>Cost Effectiveness</b>	<ul style="list-style-type: none"> <li>Benefit-to-Cost (B/C) Ratio</li> </ul>	Ratio of benefits of RTP investments to the associated investment costs.	\$3.73
<b>Productivity</b>	<ul style="list-style-type: none"> <li>Percent capacity utilized during peak conditions</li> </ul>	<p>Transportation infrastructure capacity and services provided.</p> <ul style="list-style-type: none"> <li>Roadway Capacity - vehicles per hour per lane by type of facility.</li> <li>Transit Capacity - seating capacity utilized by mode.</li> </ul>	20% improvement at known bottlenecks
<b>Sustainability</b>	<ul style="list-style-type: none"> <li>Total cost per capita to sustain current system performance</li> </ul>	Focus is on overall performance, including infrastructure condition. Preservation measure is a sub-set of sustainability.	\$20 per capita, primarily in preservation costs
<b>Preservation</b>	<ul style="list-style-type: none"> <li>Maintenance cost per capita to preserve system at base year conditions</li> </ul>	Focus is on infrastructure condition. Sub-set of sustainability.	Maintain current conditions
<b>Environmental</b>	<ul style="list-style-type: none"> <li>Emissions generated by travel</li> </ul>	Measured/forecast emissions include CO, NOX, PM10, SOX and VOC. CO2 as secondary measure to reflect greenhouse emissions	Meets conformity requirements
<b>Environmental Justice</b>	<ul style="list-style-type: none"> <li>Expenditures by quintile and ethnicity</li> <li>Benefit vs. burden by quintiles</li> </ul>	<p>Proportionate share of expenditure in the 2004 RTP by each quintile</p> <p>Proportionate share of benefits to each quintile ethnicity</p> <p>Proportionate share of additional airport noise by ethnic group</p>	No disproportionate impact to any group or quintile


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**Orange County Transportation Authority:** Lou  
Correa, County of Orange

**Riverside County Transportation Commission:**  
Robin Lowe, Hemet

**Ventura County Transportation Commission:**  
Keith Millhouse, Moorpark

**MEMORANDUM**

**TO:** Imperial Valley Association of Governments  
Los Angeles County Metropolitan Transportation Authority  
Orange County Transportation Authority  
Riverside County Transportation Commission  
San Bernardino Associated Governments  
Ventura County Transportation Commission

**CC:** Subregions  
Caltrans Districts 7, 8, 11, 12  
Transit Operators  
Ports and Airports

**FROM:** Hasan Ikhrata, Director, Planning and Policy

**DATE:** May 4, 2006

**SUBJECT:** **2007 Regional Transportation Plan – Project List Update**

SCAG is in the process of updating the Regional Transportation Plan (RTP), which is currently scheduled for adoption by the Regional Council in December 2007. This effort involves reviewing and adjusting the planning assumptions, including the growth forecast, financial plan, and transportation projects and programs, to reflect the latest available information and regional priorities.

SCAG is asking that the county transportation commissions and IVAG take the lead in coordinating their respective countywide submittals for consideration in the 2007 RTP. The focus of this exercise is to update information on all of the regionally significant projects that were included in the 2004 RTP as constrained or unconstrained projects, and to submit additional projects, if any, for consideration in the 2007 RTP. A spreadsheet file will be provided to facilitate this process.

This task consists of the following steps:

1. Review the spreadsheet containing constrained and unconstrained projects from the 2004 RTP.
2. Identify changes to project scope, cost, and schedule, including project completion or project deletion. If the project has been programmed in the Regional Transportation Improvement Program (RTIP), identify the amount programmed and the RTIP project ID number.



3. Identify any additional projects that are not in the lists but which you would like to be considered for the 2007 RTP. You must provide a sufficiently detailed project description that includes project limits and location, cost, funding source(s), and schedule for completion. This information is necessary to allow us to properly assess the RTP's financial constraint and regional emissions analysis, which are both part of the federally required conformity determination.

The listing of projects is critical, as those projects that are not included as part of an adopted and conforming RTP will not receive environmental clearance by the federal agencies and will not receive state or federal transportation funds. Additionally, the RTP must include all regionally significant projects, regardless of funding source, in its emissions analysis.

Please also note that while the spreadsheet provided represents projects above and beyond the RTIP, the RTIP does represent the critical baseline component of the RTP. Where such information on total project cost or project scope and schedule may be lacking in the RTIP database, we will be seeking that information from you as well.

My staff will be contacting you shortly to schedule individual meetings to further discuss in detail this process and any questions you may have regarding the RTP and your county's submittal. The deadline for submittals to SCAG is close of business on June 30, 2006. Should you have any questions regarding this request, please feel free to contact Philip Law at 213-236-1841 or law@scag.ca.gov.

Southern California Association of Governments

## Transportation Finance Task Force

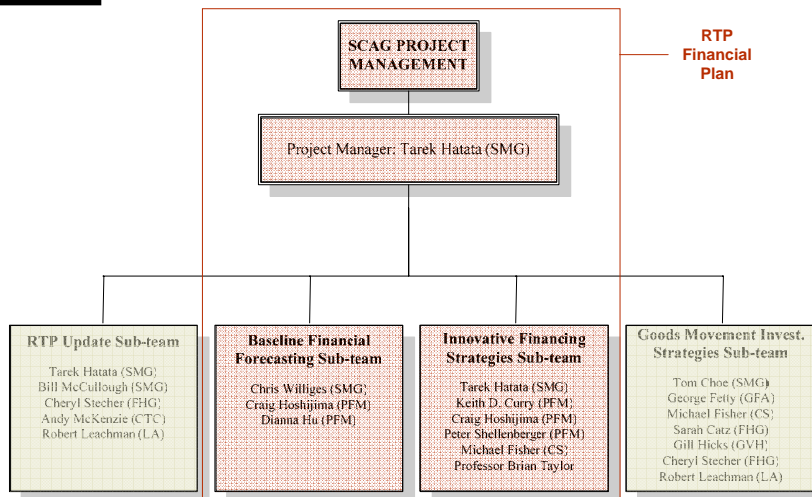
### Proposed Work Plan and Schedule for the 2007/2008 RTP Financial Plan Update

Los Angeles, CA  
March 30, 2006

System Metrics Group, Inc.

#### Introduction

### Regional Transportation Plan (RTP) Consulting Team



## Roles for the RTP Financial Plan

- **System Metrics Group (SMG)**
  - Chris Williges
  - Oversee project, lead baseline financial model
- **Public Financial Management (PFM)**
  - Craig Hoshijima
  - Lead innovative financing strategies, help develop funding scenarios for baseline
- **Cambridge Systematics (CS)**
  - Mike Fischer
  - Provide input on innovative financing
- **Dr. Brian Taylor (UCLA)** – research policy issues, especially transportation pricing

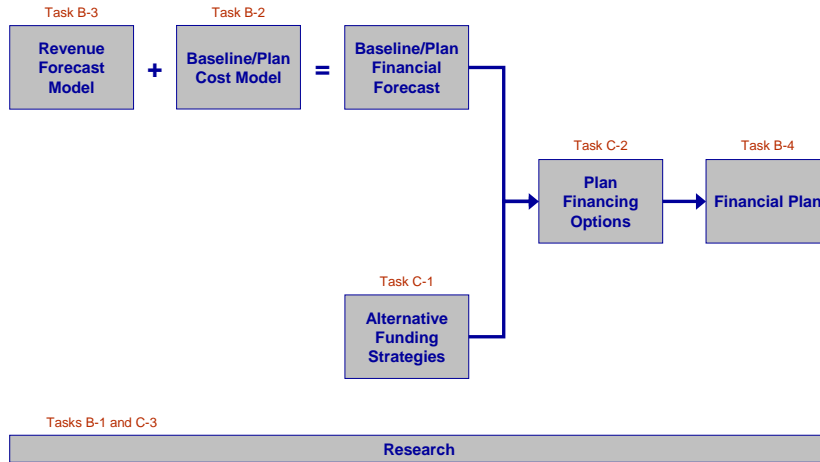
## The consulting team is working on two components...

COMPONENT	COMPONENT TASK DESCRIPTION	TASK DELIVERABLES
B: Baseline Financial Forecasting	B-1 Support SCAG staff in guiding Transportation Finance Task Force	Written reports/presentations as directed by staff <b>Research</b>
	B-2 Develop regional cost model for RTP update	Update Memoranda on cost model development Preliminary & final cost models <b>Cost Model</b>
	B-3 Develop Baseline Financial Model for 2007 RTP	Periodic update reports/memoranda on status of financial plan as directed by staff <b>Rev. Model</b>
	B-4 Prepare & submit final financial plan report	Draft & Final RTP Financial Plan <b>Financial Plan</b>
C: Innovative Financing Strategies	C-1 Review alternative funding strategies/revenue streams	Alternative Financing Options Report <b>Alt. Strategies</b>
	C-2 Recommend specific plan/optimal financing method & implementation framework	Draft & Final financing options/recommendations (separate goods movement reports) Periodic update status memoranda Presentations to task forces, committees & roundtables <b>Financing</b>
	C-3 Serve as technical resource to staff on innovative financing related issues	Written reports/presentations as directed by staff <b>Research</b>

## Work Plan



### ... Which will lead to the RTP Financial Plan



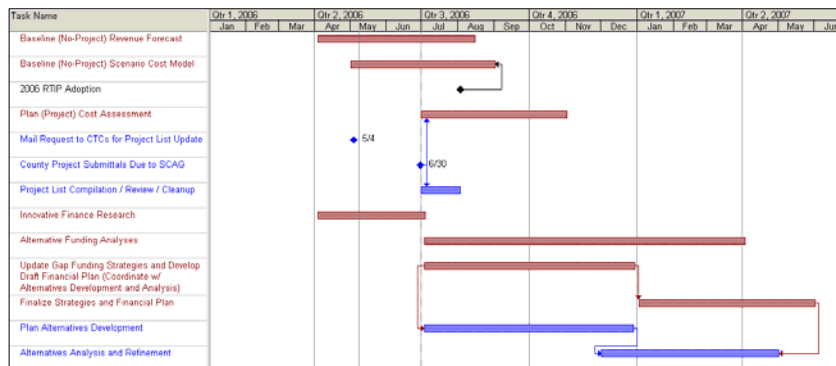
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## Work Plan



### We intend to finalize the Financial Plan by Summer 2007



**Our work will be coordinated with alternatives development and analysis for the RTP**

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## Critical Activities and Milestones for Financial Plan

### Baseline Revenue Forecast

- Review of 2004 RTP Revenue Estimates
- Developments Since 2004 RTP Adoption
- Identification of Key Drivers by Revenue Source
- Evaluation of Economic Projection Sources
- Proposed Revenue Model Structure
- Proposed Scenarios for Federal and State Sources

### Baseline Cost Model and Plan Cost Assessment

- Review of Sources for Cost Estimates
- Discount Rate and Cost Escalation
- Discussions with County Commissions
- Identification of Baseline Versus Plan
- Preliminary Cost Model

### Alternative Funding/Innovative Finance

- Potential Innovating Financing Developments
- Alternative Financing Options

### Draft Financial Plan and Gap Funding Strategies

- Draft Financial Model with Preliminary Results
- Draft Innovative Financing Revenue Scenarios
- Draft RTP Financial Plan

### Finalize Strategies and Financial Plan

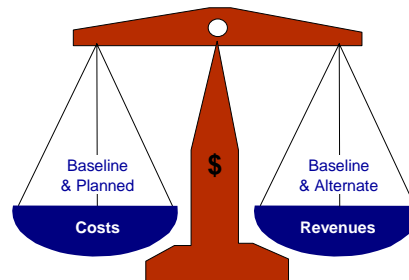
- Final Financial Model and Documentation
- Recommended Innovative Financing Scenario
- Final Financing Recommendations
- Final RTP Financial Plan

## Primary Efforts for This Fiscal Year

- Review revenue sources (SMG)
- Propose revenue and cost model structure (SMG)
- Research policy issues (Dr. Taylor)
- Identify innovative financing developments and alternative options (PFM)
- Prepare goods movement financing strategies (PFM)

## Baseline Financial Forecast

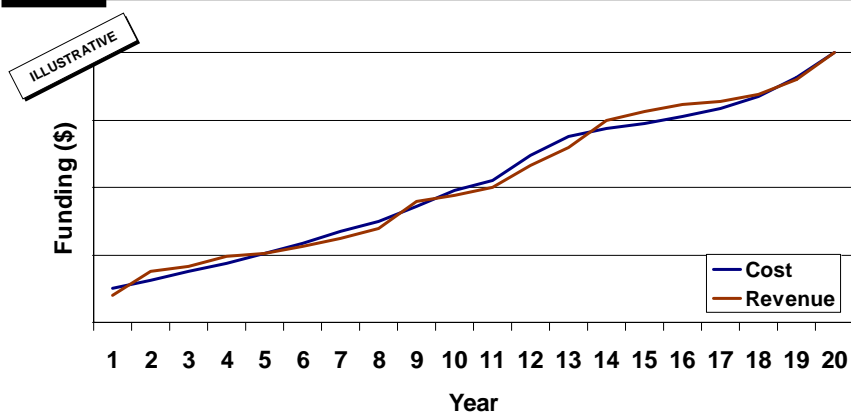
- Provide a regional view of baseline transportation finances
- Support county and local estimates
- Work with county commission staff on assumptions
- Include two components:
  - Costs (project-based)
  - Revenues (source-based)



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## Separate Forecasting of Costs and Revenues



- May result in slightly different annual estimates
- Need to be in "same dollars" (adjusted for inflation or not)

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## We will start by identifying factors that influencing the revenue forecast

Revenue Forecast FY2002-FY2030 (in Billions)	
<b>Revenue Sources</b>	
<b>Local Sources</b>	
Transportation Development Act (TDA)	\$17.58
Local Sales Tax	42.31
Farebox	14.16
Gas Tax Subventions	3.37
Local Agency Funds	8.74
Miscellaneous Funds	3.00
Miscellaneous Carryover	1.87
<b>Subtotal</b>	<b>\$90.63</b>
<b>State Sources</b>	
STIP Regional	\$6.04
STIP Interregional	1.49
(TCRP) Proposition 42	5.90
State Transit Assistance (STA)	0.76
TR&D (TCIP) Prop 116	0.11
SHOPP/O&M	4.21
Miscellaneous Carryover	0.09
<b>Subtotal</b>	<b>\$17.56</b>
<b>Federal Sources</b>	
RSTP	\$2.15
CMAQ	2.11
Other Demonstration	2.16
Sec. 5309	1.47
Sec. 5307	3.96
Miscellaneous Carryover	0.42
<b>Subtotal</b>	<b>\$12.16</b>
<b>Total</b>	<b>\$120.35</b>

Note: For extensions of terms, please see Glossary.  
Numbers may not add up due to rounding.

Source: 2004 SCAG Regional Transportation Plan (Table 2.6)

Population  
Taxable sales  
Transit performance

Population  
Employment  
Spending rates

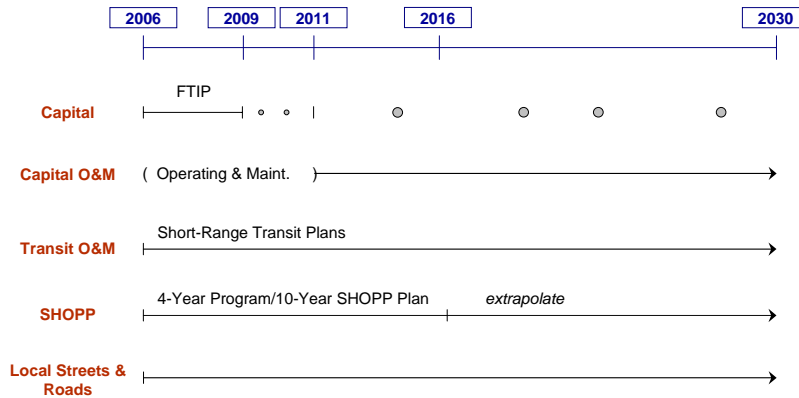
Ridership  
Transit fares

## We also need to identify appropriate demographic and growth projections

- UCLA Anderson Forecast for California
- Regional forecasts produced by CSU Fullerton and CSU Long Beach
- County Transportation Commissions' sales tax forecasts
- California Department of Finance population forecasts
- The California Transportation Commission's fund estimate for the State Transportation Improvement Program (STIP)
- California Motor Vehicle Stock, Travel and Fuel Forecast (MVSTAFF)
- Caltrans county-level socio-economic impacts

**Our projections should be consistent with the SCAG regional planning model and county projections**

## For the cost model and assessment, we need to identify baseline and planned projects



We may need to designate some projects (must-haves and future phases of existing projects) as “baseline +” or “Tier 2”

## We anticipate several challenges in developing the cost model

- Unable to identify full costs
- Difficult to estimate costs for future year phases
- Cost escalations
- Some categories are lump sums
- Fiscally constrained costs versus full needs
- A greater than 10 to 15 percent cost change means RTP and RTIP amendments



## Wrap-Up



### We need your input on potential policy issues to research (examples below)

- Recent rise in steel and concrete costs – Is this a short-term blip?
- Alternative fuel penetration / fuel efficiency / ethanol
- Oil shortage
- Aging population (driving patterns, sales tax forecast)

## Wrap-Up



### Contacts

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